

## From Manual to Seamless: Streamlining RFPs for Brown Advisory with PMAPS and Salesforce Integration

### Success Highlights

Streamlined RFP Process

Improved Accuracy and Compliance

Enhanced Reporting and Efficiency

### Company Snapshot

#### Industry

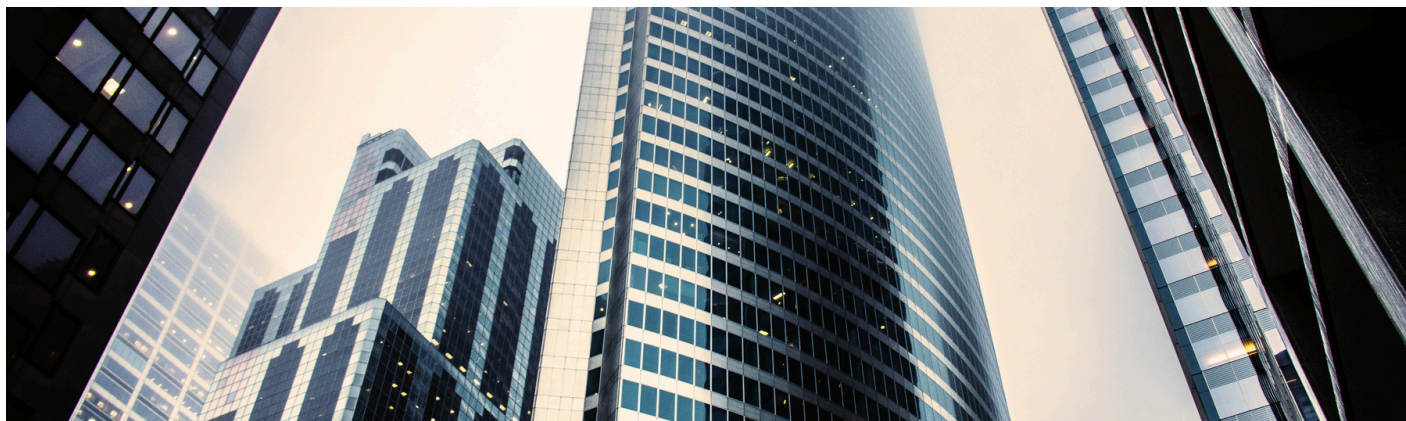
Financial Services

#### Company Size

501-1,000

#### Location

Baltimore, MD



### About

Brown Advisory is an independent investment management and strategic advisory firm committed to delivering a combination of first-class performance, strategic advice, and the highest level of client service. The firm's clients—including individuals, families, family offices, endowments, foundations, charities, institutions, consultants, and financial intermediaries—are served by over 900 colleagues worldwide, all of whom are equity owners of the firm.

## Challenge

Brown Advisory struggled with manual creation of Request for Proposals (RFPs) within Word documents. They had difficulty finding the right content in a timely manner, they were not confident in the content's accuracy, the compliance process was tedious, and there were inconsistent team metrics. Reactive ad-hoc updates were made to RFP content from Subject Matter Experts (SMEs), and originally, an average of 28 hours was spent on each proposal.

## Solution

A concise attribute structure for content was created which enabled quick retrieval, and a Database Administrator was established so all content was reviewed by Subject Matter Experts. A Salesforce integration was deployed, and historical RFP tracking was imported. Additionally, a new workflow was established to assign SMEs and Request for Information (RFI) requests directly in PMAPS.



## Impact

Brown Advisory reduced time with the new quick retrieval method. A regular review process was implemented with monthly, quarterly, and annual review cycles. Real-time reporting was enabled through the Salesforce integration. Organization and compliance improved, and a new workflow ensured a more efficient RFP process overall.



## Takeaways

Brown Advisory transformed its RFP process by implementing PMAPS. With structured content, SME review workflows, and a Salesforce integration, they cut proposal times by 75%. The changes improved content accuracy, compliance, and reporting while enabling faster retrieval, efficient tracking, and regular review cycles.